

THE DISPATCH · SPECIAL EDITION / FRANCHISE + DEALERSHIP GROUPS

Franchise Dealer 2025 Industry data.

A 2025 full-year readout for the franchise channel and the 150 largest U.S. dealership groups, drawn verbatim from the NADA Data 2025 report and the Automotive News Top 150, with Solera product angles our field teams can use to move from data to dealer conversations.

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Dealers **thrive** here.™

01 Executive Summary

FRANCHISE + GROUPS

Franchise retail closed 2025 with its best new-vehicle year since 2019, \$1.3 trillion in total dealership sales, and revenue up 4.5% per store on average. Service and parts grew to \$164.6 billion. The 150 largest groups moved 9.43 million combined units and posted \$422 billion in all-departments revenue, with the top 10 alone controlling 1,885 rooftops.

- 01 16,990 franchised light-vehicle dealers sold 16,233,363 light-duty units in 2025, with total dealership sales topping \$1.3 trillion ([NADA Data 2025](#)).
- 02 Average franchised dealership revenue rose 4.5% year over year, with growth across new, used, and fixed operations ([NADA Data 2025](#)).
- 03 New-vehicle inventory ended 2025 at 2.58 million units on ground and in transit, down 7.6% year over year and roughly 44 days' supply ([NADA Data 2025](#)).
- 04 BEV market share peaked at 11.8% in September 2025 before falling to 5.9% in October after the federal EV tax credit expired; franchised dealers handled 51% of all BEV sales for the year ([NADA Data 2025](#)).
- 05 Service and parts sales across franchised dealerships totaled \$164.6 billion, with 276.1 million repair orders written at an average of \$494 per customer RO ([NADA Data 2025](#)).
- 06 Dealership advertising hit \$9.96 billion in 2025 (\$739 per new unit), with 54.8% of media spend flowing to SEO, SEM, social, and third-party listings ([NADA Data 2025](#)).
- 07 2025 new-vehicle sales mix: 2.76M cars, 13.48M light-duty trucks; light-duty trucks now represent 83.0% of new-vehicle sales ([NADA Data 2025](#)).
- 08 Captive finance share of new-vehicle financing slipped to 54.0% in Q4 2025 from 57.9% a year earlier, with banks climbing to 27.4% and credit unions to 10.5% ([NADA Data 2025 / Experian](#)).
- 09 Average new-vehicle loan payment reached \$767 per month at a 6.4% interest rate and 67.7-month term in Q4 2025; 29.6% of new loans now run 73-84 months ([NADA Data 2025 / Experian](#)).
- 10 The Automotive News Top 150 Dealership Groups retailed 4,144,333 new units and 9,426,182 total units from 4,806 stores, with combined all-departments revenue of \$422.16 billion ([Automotive News Top 150, 2026](#)).

02 Top 10 U.S. Dealership Groups

RANKED 2025

Lithia Motors PUBLIC · RANK 1

382,921 new retail units, 435,070 used, 953,078 total units across 447 rooftops. All-departments revenue of \$37.63 billion keeps Lithia the U.S. retail scale leader. Led by Bryan DeBoer, president and CEO. ([Automotive News Top 150](#))

Penske Automotive Group PUBLIC · RANK 2

259,502 new retail, 226,301 used, 583,250 total units from 357 rooftops, \$31.81 billion revenue. Penske moves up from 2024 rank 3. Led by Roger Penske, CEO. ([Automotive News Top 150](#))

AutoNation PUBLIC · RANK 3

259,264 new retail and 269,558 used units from 271 stores. Total 528,822 units and \$27.63 billion in all-departments revenue. Led by Mike Manley, director and CEO. ([Automotive News Top 150](#))

Group 1 Automotive PUBLIC · RANK 4

224,166 new retail and 234,906 used, 524,027 total units from 254 stores, \$22.57 billion in all-departments revenue. Led by Daryl Kenningham, president and CEO. ([Automotive News Top 150](#))

Asbury Automotive PUBLIC · RANK 5

181,204 new retail and 143,126 used, 324,330 total units from 172 stores, \$18.00 billion in all-departments revenue. Led by David Hult, president and CEO. ([Automotive News Top 150](#))

Sonic Automotive PUBLIC · RANK 6

115,981 new retail and 171,838 used, 324,792 total units from 129 rooftops, \$15.15 billion in all-departments revenue. Led by David Smith, CEO. ([Automotive News Top 150](#))

Hendrick Automotive PRIVATE · RANK 7

115,037 new retail and 98,723 used, 282,796 total units from 96 rooftops, \$14.91 billion in all-departments revenue. Largest private U.S. dealer group, led by Rick Hendrick, chairman and CEO. ([Automotive News Top 150](#))

Morgan Auto Group PRIVATE · RANK 8

95,534 new retail and 93,425 used, 241,564 total units from 76 stores, \$9.77 billion in all-departments revenue. Led by Brett Morgan, president and CEO. ([Automotive News Top 150](#))

Ken Garff Automotive PRIVATE · RANK 9

63,324 new retail and 57,640 used, 163,067 total units from 69 stores, \$7.30 billion in all-departments revenue. Led by John Garff and Brett Hopkins, CEOs. ([Automotive News Top 150](#))

Wilson Automotive PRIVATE · RANK 10

56,345 new retail and 25,104 used, 97,498 total units from 14 rooftops, \$3.81 billion revenue with the highest per-store productivity in the Top 10. Led by Craig Whetter, president. ([Automotive News Top 150](#))

OTHER NOTEWORTHY DEALERS / NETWORKS

Gettel Automotive: Biggest climber inside the Top 50, up from 2024 rank 51 to 2025 rank 34 ([Automotive News Top 150](#)).

Hudson Automotive Group: Climbed from 2024 rank 12 to 11 on 151,796 total units across 63 stores with \$5.93B in revenue ([Automotive News Top 150](#)).

Ken Ganley Automotive: Moved up four spots to 14 on 110,705 total units across 59 stores ([Automotive News Top 150](#)).

Napleton Automotive Group: Held in the Top 25 at 24 with 30,638 new retail, 39,586 used, and 53 stores ([Automotive News Top 150](#)).

03 Broader U.S. Retail Automotive Trends

SIGNAL SCAN

SERVICE & PARTS

Service and parts reached \$164.6 billion for the channel, \$9.69 million per store, with an average customer mechanical labor rate of \$186. Fixed ops remains the highest-margin profit lane for franchise dealers ([NADA Data 2025](#)).

EV MIX VOLATILITY

BEV share spiked to 11.8% in September 2025 then collapsed to 5.9% in October after the federal tax credit expired. Franchise stores captured 51% of full-year BEV sales ([NADA Data 2025](#)).

AD SPEND MIX

Digital and listing channels absorbed 54.8% of the \$9.96B dealership ad spend: SEM 21.1%, SEO 19.5%, third-party 20.0%, social 14.2%. Traditional media continues to shrink ([NADA Data 2025](#)).

CONSUMER FINANCE

67.7-month average new loan term, \$767 monthly payment at 6.4% interest, with 29.6% of loans now 73-84 months. Payment affordability is the single biggest conversion variable ([NADA Data 2025 / Experian](#)).

GROUP CONSOLIDATION

The Top 150 dealership groups control 4,806 rooftops and \$422.16B in revenue. The Top 10 alone run 1,885 stores and \$188.6B, nearly 45% of Top 150 revenue ([Automotive News Top 150](#)).

USED AT FRANCHISE

13.1M used vehicles moved through franchise stores in 2025 at a \$28,680 average retail price. 45.4% of used inventory came from new-vehicle trades, 23.6% from used trades, and 21.9% from auctions ([NADA Data 2025](#)).

04 Opportunity Analysis

SOLERA PRODUCT LENS

Marketing & Websites

AUTOPOINT MARKETING · DEALERFIRE

- SEM (\$123,698 avg per store), SEO (\$114,318), and third-party listings (\$117,249) together ate \$355K per store in 2025. [Marketing](#) and [Websites](#) let groups consolidate those budgets under shared attribution instead of vendor sprawl ([NADA Data 2025](#)).
- Social media advertising hit \$83,247 per store. Coordinated social and site experiences across a Top 150 footprint require templated creative and inventory feeds at the group level, not store-by-store workarounds.
- With \$739 in ad spend per new unit and 955 units sold per dealership, every 10-basis-point improvement in site-to-store conversion is worth real revenue. [Websites](#) conversion tooling and live inventory feeds are the most direct lever.

CRM

DEALERSOCKET CRM

- 139 used-vehicle retail sales per salesperson in 2025, the highest in seven years, means lead quality and follow-up cadence drive the variable line. [CRM](#) workflow automation converts more of those at-bats ([NADA Data 2025](#)).
- Captive share of new-vehicle finance fell 390 basis points year over year to 54.0% while banks rose to 27.4%. CRM-managed lender routing and real-time decisioning protect F&I gross as captives loosen their grip ([NADA Data 2025 / Experian](#)).
- BEV retailing volatility (11.8% share one month, 5.9% the next) demands CRM segmentation that flags EV-intent leads and retargets them as OEM programs reset for 2026.

Fixed Ops

SERVICE SUITE · SHUTTLE ON DEMAND · INSPECT · PAYMENTS

- 276 million repair orders at an average of \$494 per customer RO make fixed ops the most predictable earnings lane. [Service Suite](#) tools tighten write-up, MPI, and payment collection across every RO ([NADA Data 2025](#)).
- Express service sits at 47.8% of franchise stores, down from 51.9% at the peak. Groups using Inspect-style digital MPI and Shuttle on Demand can rebuild express volume without adding bays.
- Customer labor rate hit \$186 an hour. Friction-free digital pay and pay-by-link via [Service Suite Payments](#) protects CSI and cash velocity at the counter.

Dealer Ops

AUTO/MATE DMS · INVENTORY+ · TITLING · LOJACK · GOLDSTAR · PERI

- 4,806 rooftops across the Top 150 make multi-store data architecture a survival skill. [DMS](#) gives groups a single accounting, F&I, and reporting spine without re-platforming per acquisition ([Automotive News Top 150](#)).
- 44 days' supply on 2.58M units of new inventory calls for price-to-market discipline. [Inventory+](#) merchandises new and used against live market data across the group footprint.
- [Titling](#) automation is the low-hanging operational win on 955 new deliveries per store plus 137 used per salesperson, capturing every lien and state rule once then re-using across the group.
- [LoJack](#) asset protection and connected-vehicle services give groups a scalable accessory and recurring-revenue layer on every delivery; [Peri Payments](#) adds PCI-compliant card, wallet, and ACH flows integrated back to the DMS.

05 What to Watch in 2026

CALENDAR & CATALYSTS

Post-Credit EV Demand

OEM PROGRAMS

After the federal EV tax credit expired in September 2025, BEV share plunged from 11.8% to 5.9%. Watch OEM incentive resets and captive remarketing programs as the market searches for a new floor.

[NADA Data 2025](#)

Group M&A Velocity

CONSOLIDATION

The Top 10 already control 1,885 rooftops. Watch Lithia, Asbury, Group 1, and Hudson buy-sell disclosures for 2026 rank shifts.

[Automotive News Top 150](#)

Inventory Rebalance

SUPPLY

New inventory ended 2025 at 2.58M units. NADA expects levels to hold through mid-2026, build in Q3, and sell off in Q4. Year-end 2026 projected flat.

[NADA Data 2025](#)

Finance Source Shift

CONSUMER FINANCE

Captive share dropped to 54.0% while banks rose to 27.4%. Dealer F&I strategy should plan for less captive-driven rate support in 2026.

[NADA Data 2025 / Experian](#)

Fixed Ops Labor

SERVICE

Express service share slid from 51.9% peak to 47.8%. Groups that re-standardize digital MPI and shuttle ops in Q1 2026 will recapture the lane.

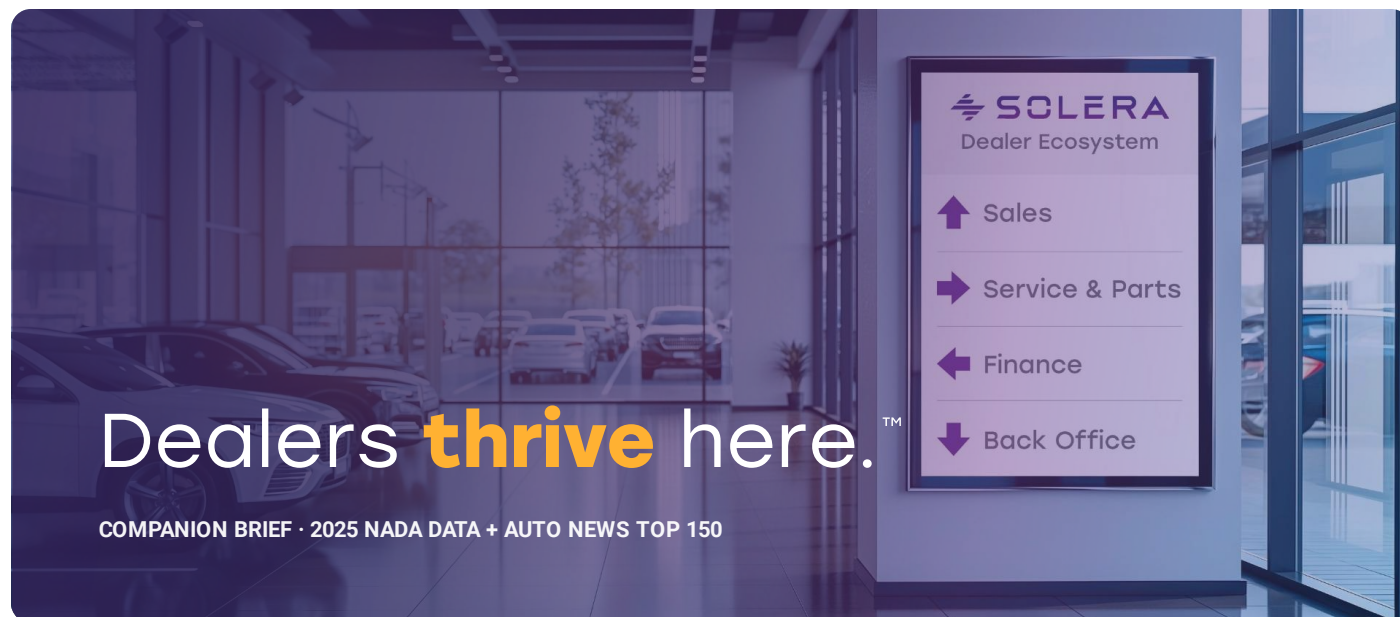
[NADA Data 2025](#)

Digital Ad Inflation

MARKETING

Dealership ad spend hit \$9.96B with SEM at \$123,698 per store. Watch for Google and Meta auction pressure as retailers chase post-peak used supply.

[NADA Data 2025](#)



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REPORT FOCUS

2025 NADA Data full-year report and Automotive News
2026 Top 150 Dealership Groups. Franchise, public, and
multi-rooftop groups.